BEACON Support Team (BST) Sponsor Meeting

March 20, 2007
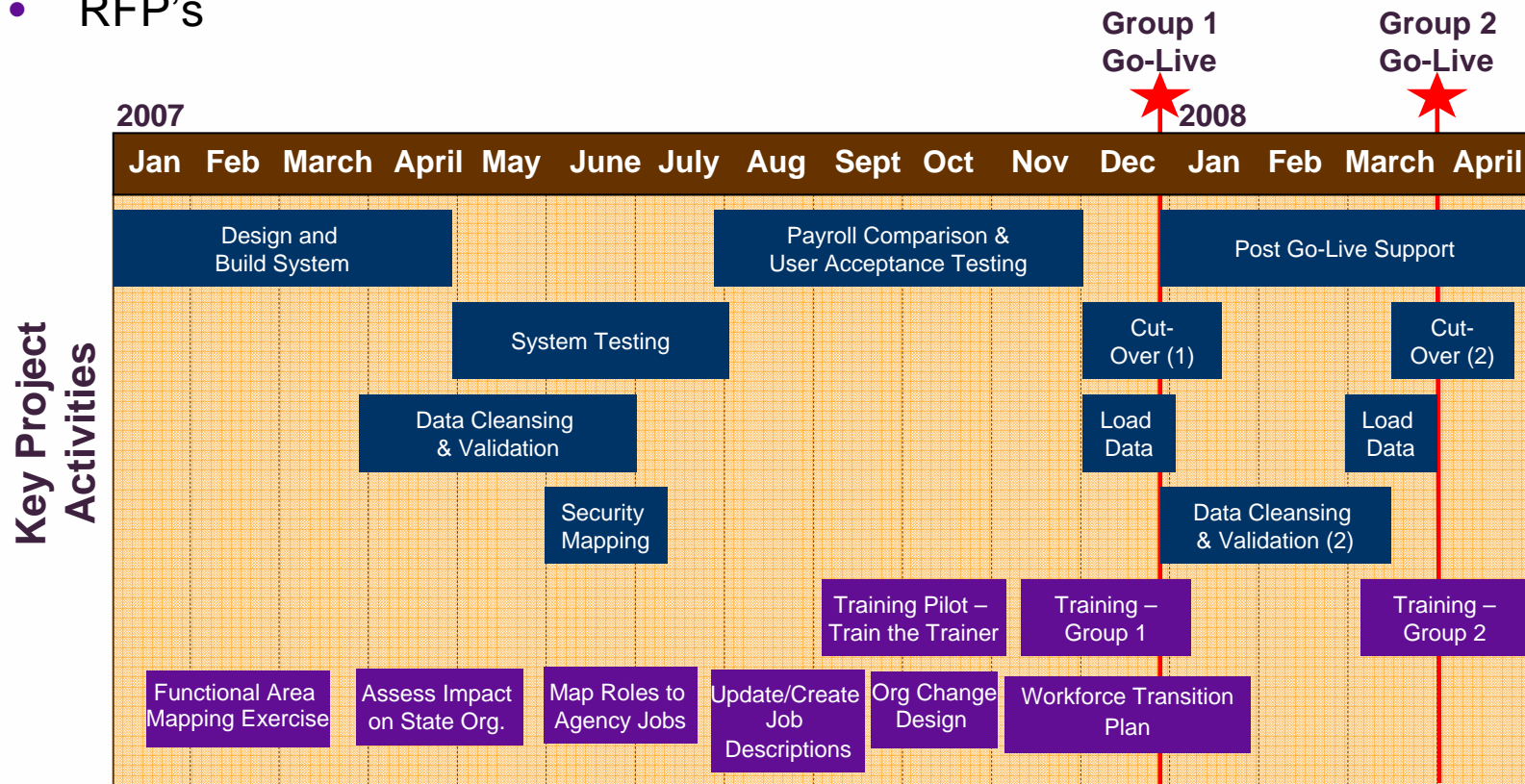
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Agenda

- Project Update
    - Lowell Magee
- Time Capture Overview
    - Karen Boodee/Lowell Magee
- SAP Security Overview
    - Shelly Eckerman
- Deployment Update
    - Teresa Shingleton
- Upcoming Project Activities
    - Edward Brodsky
- Questions and Answers

Project Update

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Project Update

- Design and Build Status
- RFP's

Timeline chart:

Group 1 Go-Live | **Group 2 Go-Live**

2007 — Jan Feb March April May June July Aug Sept Oct Nov Dec **2008** Jan Feb March April

Key Project Activities

- Design and Build System
- Payroll Comparison & User Acceptance Testing
- Post Go-Live Support
- System Testing
- Cut-Over (1)
- Cut-Over (2)
- Data Cleansing & Validation
- Load Data
- Load Data
- Security Mapping
- Data Cleansing & Validation (2)
- Training Pilot – Train the Trainer
- Training – Group 1
- Training – Group 2
- Functional Area Mapping Exercise
- Assess Impact on State Org.
- Map Roles to Agency Jobs
- Update/Create Job Descriptions
- Org Change Design
- Workforce Transition Plan

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Time Capture Demo & Overview

- Educate State Agencies regarding Time Entry Alternatives available with the BEACON SAP HR/Payroll implementation

- Gather data from all State agencies regarding current practices and expectations

- Document and resolve outstanding issues regarding configuration requirements and expectations across agencies

- Report findings that will support the training and roll-out model

There are two ways employees record time:

- **Positive Time**: Employees record all of their time worked and all of their exceptions, such as leave taken, each month.

- **Negative Time**: Employees only record variations from their normal schedule, such as leave taken.

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There are also two ways employees are paid:

- **Actual Pay**: Employees are paid based on their actual time worked.

- **Exception Pay**: Employees are paid their regular salary at month-end, plus or minus any exceptions they recorded. Any exceptions are processed in the next available pay cycle.

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Permanent employees **fall into one of three categories:**

- **Positive Time/Actual Pay**: Employees must enter time to be paid. DOT is the only agency in this category.

- **Positive Time/Exception Pay**: Agencies require employees to enter time worked and exceptions to regular time. Exceptions are processed in the next available pay cycle.

- **Negative Time/Exception Pay**: Employees are not required to enter time worked, but are required to note exceptions. Exceptions are processed in the next available pay cycle.

- **NOTE: Permanent employees subject to FLSA regulations must fall into the Positive Time category.**

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- Monthly exception-based pay is the rule, with actual pay as the exception.

  ➢ Except for DOT, which already practices positive time/actual pay, agencies were told actual pay was not possible at this time (except for temporary employees).

- Project team will try to accommodate requests for items that do not exist today (e.g. cost objects).

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In the future Temporaries Employees will

- Continue to record time to be paid (Positive Time/Actual Pay)

- Be paid biweekly, "two weeks" in arrears. This is a change from current practice.

- Reflect different numbers than identified in the appendix from PMIS.

- Many agencies expressed an interest in switching to positive time (entering all information, not just exceptions) for exempt employees than is currently the practice now.

- BEACON will assist support agency efforts to follow policies. For example: three agencies do not require employees subject to FLSA enter positive time now, but will in the new system.

- A large number of agencies expressed the desire to have their employees enter time through ESS, which will be a change for most agencies' current practice of timekeeper entry. This change will impact training and the existing workforce.

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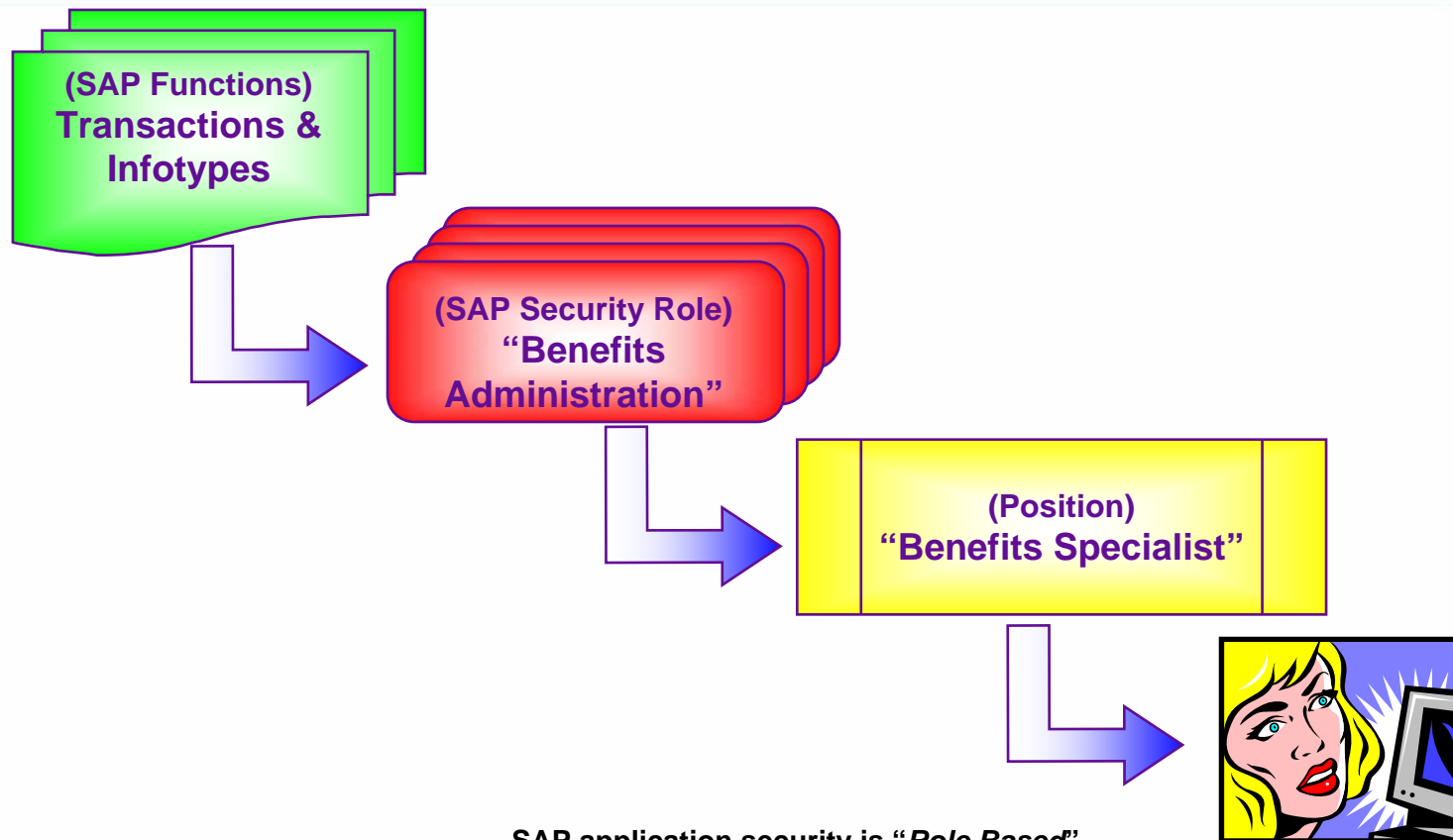
Next Steps and Recommendation

- Continue with configuration to support the information gathered in the discussions with agencies.

- Compose and send formal communication to all agencies confirming choices and what they mean to the agency.

SAP Security Overview

Purpose of Presentation

- To gain an understanding of SAP Security Role Design
- To gain a high-level understanding of the SAP Security Roles in scope
- To gain a high-level understanding of Mapping SAP Security Roles to Users

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SAP Security Role Approach

(SAP Functions)
Transactions &
Infotypes

(SAP Security Role)
"Benefits Administration"

(Position)
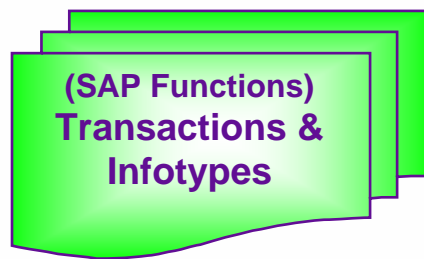**"Benefits Specialist"**

SAP application security is "_Role Based_"

Job functions have been mapped to create SAP Security Roles, which will be mapped to positions and positions are mapped to users.

It allows users to be given access based on their job responsibilities.

It also allows the BST Leads to map users to SAP Security Roles without having to know SAP functionality.

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SAP Security Role Approach
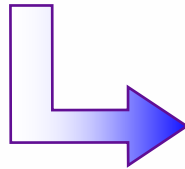
> SAP Security Team worked with the Beacon Functional Teams (i.e. Anita Ward's Team) to identify the SAP Security Roles.

> Task included mapping SAP functions (SAP transaction codes and SAP infotypes) to create the SAP security roles.

(SAP Functions) Transactions & Infotypes

(SAP Security Role) "Benefits Administration"

SAP application security is "_Role Based_"

Job functions have been mapped to create SAP Security Roles

SAP Security Roles - HR

Team	Central (i.e. OSP, OSC, Fiscal Research, etc)	Decentralized (i.e. Dept, Division, Section)	Security Role
Benefits	X	X	Benefits Administration
	X	X	Display Benefits
Time	X	X	Time Administration
	X	X	Time Approval
	X	X	Leave Administration
	X	X	Display Time
Payroll	X		Central Payroll Processing
	X		Central Payroll Accounting
	X		Central Garnishment Administration
	X		Central Payroll Tax
	X	X	Payroll Administration
	X	X	Display Payroll
	X		Emergency ONLY - Payroll Problem Solving
Personnel Administration	X	X	Personnel Master Data Maintainer
	X	X	Warnings Maintainer
	X	X	Grievance Maintainer
	X		Performance Rating Mass Maintenance
	X	X	Performance Rating & Credentials Mgmt
	X	X	Short Term Disability Specialist
	X	X	Display Cross Agency
	X	X	Display Sensitive HR
	X	X	Display Non-Sensitive HR
Org Mgmt	X		Org Chart Maintainer
	X		Org Chart Approver
	X	X	Org Chart Modeler
	X		Job Maintainer
	X		Job Approver
	X	X	Position Maintainer
	X	X	Position Approver
	X	X	Display Organization Management
Portal	X	X	ESS - Employee Self Service
	X	X	MSS - Manager's Self Service

- The following shows the SAP Roles defined for Beacon for HR
- HR sub-modules include Benefits, Time, Payroll, Personnel Administration and Organization Mgmt.
- Central Roles are for users getting access to ALL agencies (OSP, OSC, Fiscal Research, etc.)
- Decentralized Roles will be restricted to agencies, divisions, sections.
- Display roles exist for each area.
  - Any user that gets update to an area would get the corresponding display role (i.e. Benefits Administration would get Display Benefits).
  - The users that just need display would get the display role and not the update role (i.e. managers, directors, etc).
- The Portal will enable the user to Employee Self Service and Manager Self Service functionality.
  - Employee Self Service is the functionality to allow employees to maintain their own employee information, such as address or enroll in benefits plans.
  - Managers Self Service is the functionality to allow managers to approve an employee's time or view employee reports.

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SAP Security Roles – FI/CO/FM

➢ Since employees are associated to cost centers (CO module), company codes (FI module), and funds center (FM module), we also have a list of SAP Roles for Finance, Controlling, and Funds Mgmt that are in scope.

Finance/Controlling/Funds Mgmt Role Descriptions		
Module	**Role Name**	**Centralized/Decentralized**
Finance	Accounting Transactions Poster	
	FI Closing Coordinator	Central -> Shared Services
	Bank Master Data Specialist	Central -> Shared Services
	Chart of Accounts Master Data Specialist	Central --> OSC-SAD
	Vendor Master Data Specialist	Central -> Shared Services
	AP Payment Processor	Central
	Display Finance	Both Decentralized (Agency) and Centralized (Shared Services)
	Display Checks	Both Decentralized (Agency) and Centralized (Shared Services)
Funds Mgmt	Funds Management Master Data Specialist	Central --> Shared Services
	Display Funds Management	Both Decentralized (Agency) and Centralized (Shared Services)
Controlling	CO Closing Coordinator	Central --> Shared Services
	Controlling Master Data Specialist	Central --> Shared Services
	Cost Center Master Data Specialist	Decentralized --> Agency
	Display Controlling	Both Decentralized (Agency) and Centralized (Shared Services)
HR	Position Funding Approver	OSBM

SAP Security Roles to User Mapping

➢ SAP Security Team has knowledge transferred the SAP Roles to the Change Team

➢ Change Team owns the Role to User/Position Mapping process

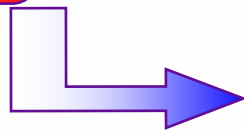➢ Change Team will work with the BST Leads to complete the Role to User / Position mapping.

(SAP Security Role)
"Benefits Administration"

(Position)
"Benefits Specialist"
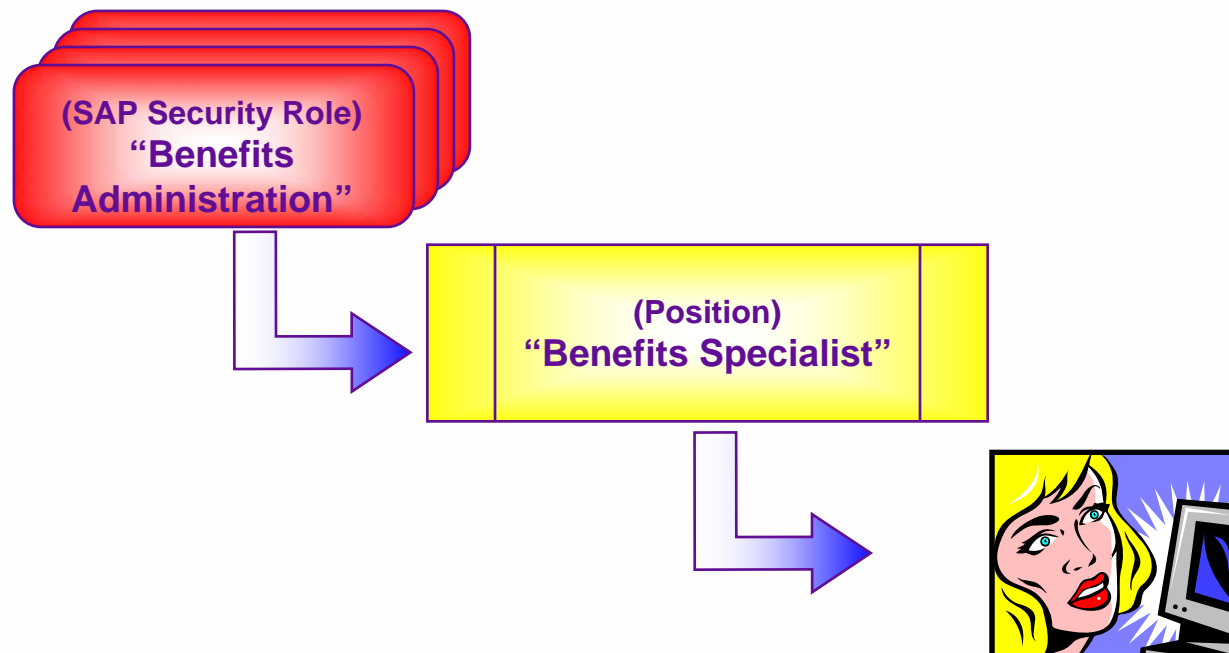
SAP Security Roles to User Mapping

➢ The BST Team will focus on mapping roles to users.

➢ We know the position of the users. When the roles are mapped to users, then roles are also mapped to the HR positions that the user belongs to.

➢ It's VERY IMPORTANT to take time to map users correctly. The mapping determines user access and training required for the user. It also helps to analyze work force transition.

➢ If a person should attend training for a role, but NOT receive the access for the role, then those exceptions must be noted. For example, you have a Benefits Director and that person does not need SAP access to benefits administration, but wants to attend the training. The Change Team will note on the role mapping spreadsheet how you can indicate these. You should know that these will need to be captured.
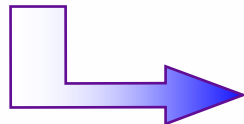
(SAP Security Role)
"Benefits Administration"

Role to User Mapping   **Thus, Position Mapping is Automatic**

Jane Smith – Benefits Specialist for DOC

Jane Smith

Bill Franklin – Benefits Technician for ESC

Bill Franklin

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![beacon HR & payroll logo]

SAP Security Roles to User Mapping

➤ Once the BST Team Leads have the listing of users to SAP security roles completed, the access will be reviewed and approved by data owners.

➤ Data owners have not been established. They may be established by agency and sub-area (i.e. Benefits, Time, Org Mgmt, Personnel Admin and Payroll).

➤ Data owners will be established before go-live to approve the final listing of role mapping. Data owners will also be responsible after go-live to approve changes or additions to role to position/user mapping.

(SAP Security Role)
"Benefits Administration"
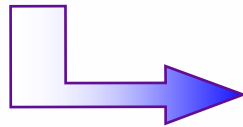
User Mapping – Position Mapping

Jane Smith – Benefits Specialist for DOC

Bill Franklin – Benefits Technician for ESC

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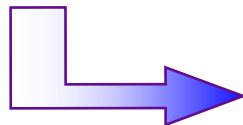
SAP Security Roles to User Mapping

➢ To give the BST Team Leads a start on role mapping, the SAP Security Team has analyzed the Legacy Systems user access (PMIS, Central Payroll and DOT Payroll) to the new SAP Security Roles (where available).

➢ For example, we have an SAP security role called "Performance Rating Maintainer". We have the list of which users currently have Performance Rating (PMPERF) access in PMIS.

➢ Note: it was noticed that many users that are no longer with the State of NC had access to PMIS. Thus, the listing of PMIS user access is a **start** to determine role mapping and should **not** be used as a final version.

USER ACCESS IN PMIS TO PERFORMANCE RATING					
RACFID	**Name**	**Agency**	**Job Title**	**Allow Trx**	**Only Trx**
AD04055	BARBARA J. WILLIAMS	ADMIN-HUMAN RES MGM	PERSONNEL ANALYST I	PMPERF	
AD04010	CATHY L. GREEN	ADMIN-HUMAN RES MGM	PERSONNEL TECHNICIAN III	PMPERF	
AD04CLG	CRESHAYE L. GRAHAM	ADMIN-HUMAN RES MGM	PROCESSING ASSISTANT III	PMPERF	
AD04SCC	SONDRA C. CHAVIS	ADMIN-HUMAN RES MGM	PERSONNEL ANALYST II	PMPERF	
AD04005	VALERIE J. FORD	ADMIN-HUMAN RES MGM	DOA, HR DIRECTOR	PMPERF	
ADWBARN	WANDA E. BARNES	ADMIN-HUMAN RES MGM	PERSONNEL ANALYST III	PMPERF	
TS75P28	BEN R. HARWARD	AGRIC-HUMAN RES MGM	A/U HR DIRECTOR II	PMPERF	
TS75P49	SHERRY LEE	AGRIC-HUMAN RES MGM	PERSONNEL ANALYST II	PMPERF	
OCPERKW	KENNETH WILLIAMS	AOC-HUMAN RESOURCES	HUMAN RESOURCES OFFICER	PMPERF	
UNAP13	JANICE G. JACKSON	APPALACHIAN STATE U	ADMINISTRATIVE ASST I	PMPERF	
UNAP33	LEONARD W. JOHNSON,JR	APPALACHIAN STATE U	PERSONNEL DIRECTOR	PMPERF	
UNAP11	SUSIE BEASLEY	APPALACHIAN STATE U	PERSONNEL ANALYST III	PMPERF	
BOE0001	GARY O. BARTLETT	BOARD OF ELECTIONS	EXC SEC DIR BOARD/ELECTIO	PMPERF	
C219610	TERRY L. BELL	COMMERCE-ADMIN	PERSONNEL ANALYST II	PMPERF	
C212123	DEBRA J. PETERSEN	COMMERCE-BANKING	OCOB HR CONSULTANT	PMPERF	
C202306	ROSEMARY A. HUFFMAN	COMMERCE-BANKING	OCOB HUMAN RESOURCE ASSOC	PMPERF	
CLFY008	APRIL TIBBS	COMMUNITY COLLEGES	PERSONNEL ASSISTANT V	PMPERF	
CLFY010	JANE G. PHILLIPS	COMMUNITY COLLEGES	PERSONNEL OFFICER III	PMPERF	
CLFY007	KAREN C. MCALLISTER	COMMUNITY COLLEGES	PERSONNEL TECHNICIAN II	PMPERF	
CLFY012	KRIS C. ROSS	COMMUNITY COLLEGES	PERSONNEL ANALYST II	PMPERF	
C600001	DOUG H. VANESSEN	COSMETIC ARTS	EX DIR,STE BD COSMETC ART	PMPERF	
C3PER10	DEBRA T. FERRELL	CRME CNTRL-PUB SAFTY-ADMIN	PERSONNEL ASSISTANT V	PMPERF	
C3PER02	KIMBERLY L. GREENE	CRME CNTRL-PUB SAFTY-ADMIN	PERSONNEL ASSISTANT IV	PMPERF	
C3PER04	SHAWNDA A. BROWN	CRME CNTRL-PUB SAFTY-ADMIN	PERSONNEL ANALYST II	PMPERF	
C3PER12	SHARON F. GREENE	CRME CNTRL-PUB SAFTY-ADMIN	PERSONNEL TECHNICIAN III	PMPERF	
C3PER01	TERESA D. CREECH	CRME CNTRL-PUB SAFTY-ADMIN	PERSONNEL TECHNICIAN II	PMPERF	
C3PER09	WELDON E. FREEMAN	CRME CNTRL-PUB SAFTY-ADMIN	A/U HR DIRECTOR II	PMPERF	
C3PER07	MARGARET MURGA	CRME CNTRL-PUB SAFTY-CCPS-HIWAY PATRL,MC	PERSONNEL ANALYST I	PMPERF	
C3PER13	MARY DELORES COOPER	CRME CNTRL-PUB SAFTY-HIGHWAY PATRO	PERSONNEL TECHNICIAN I	PMPERF	
C500087	CARMELLA R. LEACH	CULT RES-ADMI	OFFICE ASSISTANT IV	PMPERF	
N1AN702	HARLAN E. FRYE	DENR-PERSONNEL/HR	A/U HR DIRECTOR II	PMPERF	
N1AN411	RITA B. RICHARDSON	DENR-PERSONNEL/HR	STAFF DEVELOPMENT COORD	PMPERF	
N1AN327	TOULA CAPETANOS	DENR-PERSONNEL/HR	PERSONNEL TECHNICIAN I	PMPERF	

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SAP Security Roles to User Mapping

➢ After Role Mapping to Users is complete,

➢ the Change, Training and Security teams can take the listing to determine what a user has been mapped to:

(SAP Security Role)
"Benefits Administration"
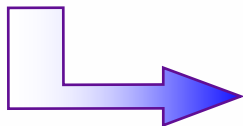
Jane Smith – Benefits Specialist for DOC
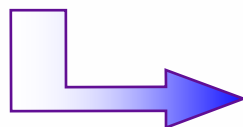
Bill Franklin – Benefits Technician for ESC

Benefits Specialist – DOC (Jane Smith)

- Benefits Administration
- Short Term Disability Specialist
- Display Benefits
- Display Payroll
- Display Time
- Display Non-Sensitive HR Data
- Display Sensitive HR Data
- ……etc

Change Team:
   This information can be used for Workforce Transition

SAP Security Team:
   Understanding which security a position and user would receive
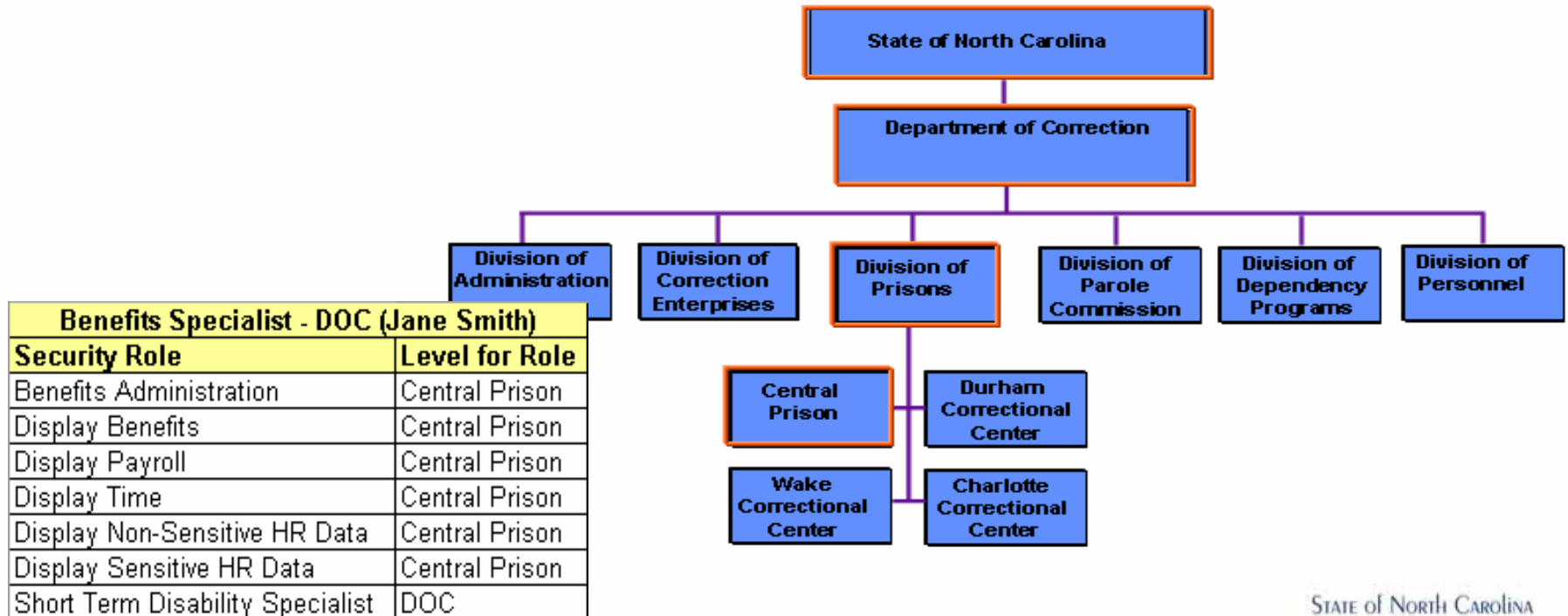
Training Team:
   Understanding which SAP courses an employee would be enrolled in

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Position Based Security

- "Position Based Security" for Role assignment
  - When a person is hired into the organization, the user id will automatically be created and access assigned based on the position they hold. No Security Request Form will be Required.
  - If Employee transfers to another position, the access to the new position will automatically be changed to the new position's access and no security request form is required.
  - Access assigned is based on roles assigned to the position
    - Position: Benefits Specialist for DOC requires the following SAP Security Roles:
      - Role: Benefits Administration – DOC,
      - Role: Display Benefits – DOC,
      - Role: Display Payroll – DOC,
      - Role: Display Time – DOC,
      - Role: Display Sensitive and Non-Sensitive – DOC
      - Role: Short Term Disability – DOC.
      - The position requires these roles. It does not matter whom resides in the position.
      - Jane Smith holds the position so she will get the access required for the position.
  - Manual access can also be granted
    - Person transfers to another position, but still requires access to old positions access. Manual user assignment would be used.
    - i.e. – Jane just transferred from DOT and requires Time Admin from DOT too. Jane will also get Time Admin for DOT, but Time Admin for DOT will not be on the Benefits Specialist – DOC position that Jane Smith holds. Time Admin – DOT would be manually added to the user and expiration date set.
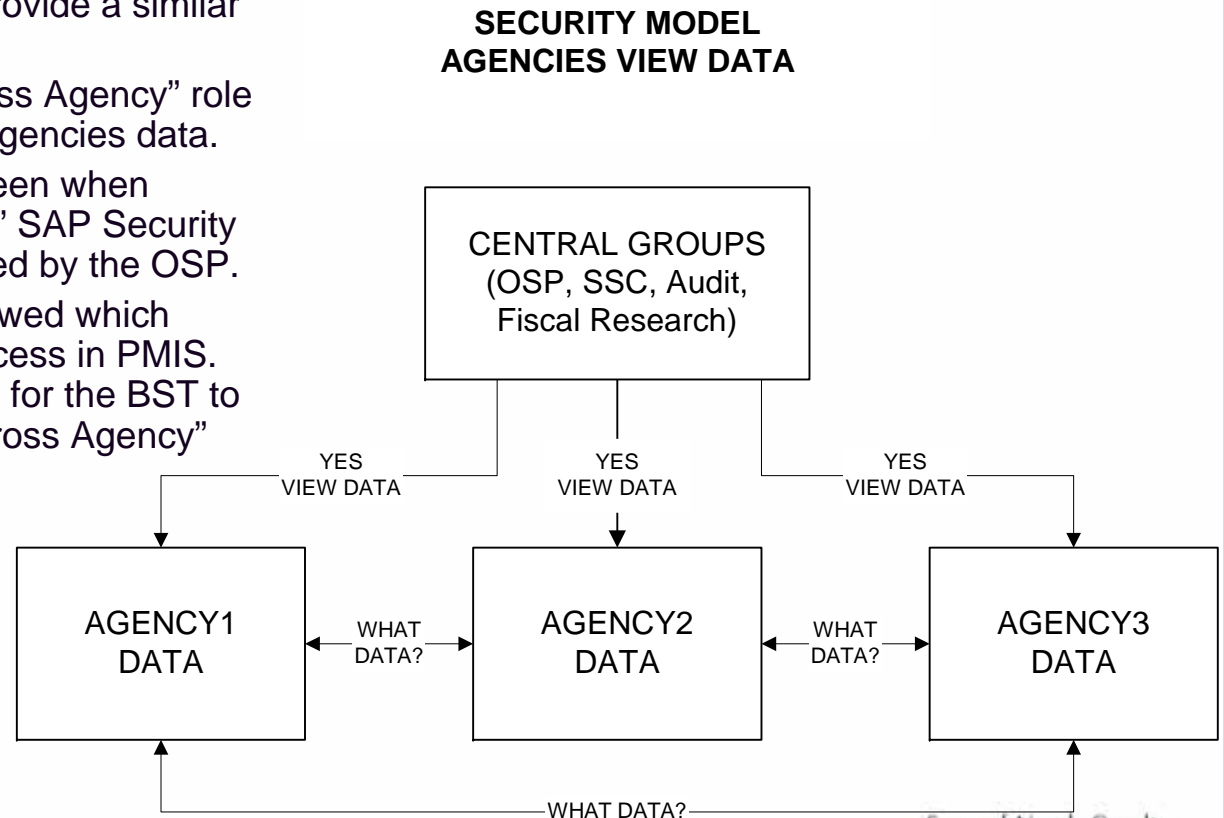   - Security Request Process will exist for manual access required.

Understanding Agency Restrictions for Roles

- In addition to securing the different functions into SAP Security Roles, SAP enables further restriction to specific levels within the organizational structure by Role.

- Based on the SAP Security Role, what level of security is required (i.e. Secure at the agency level, division level, section level) for the user.

- May be different based on security roles (See example below).

- When the Change Team is working with the BST Team Leads on mapping roles to users, they will also obtain what level of security is required by user and by role.

Benefits Specialist - DOC (Jane Smith)	
Security Role	Level for Role
Benefits Administration	Central Prison
Display Benefits	Central Prison
Display Payroll	Central Prison
Display Time	Central Prison
Display Non-Sensitive HR Data	Central Prison
Display Sensitive HR Data	Central Prison
Short Term Disability Specialist	DOC

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Understanding Cross Agency Access

- In PMIS, users with access to the VERIFY transaction are allowed access to see other agencies information.

- An SAP Security Role called "Display Cross Agency" has been developed to provide a similar concept as VERIFY in PMIS.

- Users mapped to the "Display Cross Agency" role will have access to display other agencies data.

- Analysis of what data should be seen when having the "Display Cross Agency" SAP Security Role is being reviewed and finalized by the OSP.

- The SAP Security Team has reviewed which users currently have "VERIFY" access in PMIS. This access will be a starting point for the BST to analyze users needing "Display Cross Agency" access in SAP.

**SECURITY MODEL
AGENCIES VIEW DATA**

CENTRAL GROUPS
(OSP, SSC, Audit,
Fiscal Research)

YES
VIEW DATA

YES
VIEW DATA

YES
VIEW DATA

| AGENCY1 DATA | WHAT DATA? | AGENCY2 DATA | WHAT DATA? | AGENCY3 DATA |

WHAT DATA?

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Role Mapping Dates

- Conduct Role Mapping Workshop – 5/2/07
- Complete Role Mapping Information to Change Team – 6/1/07

Deployment Update

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Upcoming Project Activities

Activities – Next 6 Weeks

Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
19	20 • 10 a.m. BST Lead Meeting – Time and Security Overviews • 4 p.m. SAP GUI install training	21 • BST Technical Readiness Agent Monthly Meeting	22 • Employee Relations Conference – Wilmington, NC	23	24	25
26	27 • 10 a.m. BST Lead Meeting – Time and Security Overviews	28 • BST Training Agent Monthly Meeting	29	30 • 403b Contribution Data due to benefits team	31	1
2 • Benefits Workshop	3	4 • Present at Annual Benefits Conference • **BST Change Agents – Impact Assessment**	5	6	7	8
9	10	11 • 10:30 a.m. Communications Agent meeting	12 • **10 a.m. – Payroll Directors Open Forum**	13 • BEACON Steering Committee meeting	14	15
16 • **2 p.m. HR Directors Open Forum** • DHHS Div. Directors	17 • 10 a.m. – BST Sponsor Meeting – Payroll and Training Updates	18 • 10 a.m. BST Technical Readiness Meeting	19	20	21	22
23	24 • 10 a.m. – BST Lead Meeting – Payroll and Training Updates	25	26	27	28	29

What do we need from you?

- Plan and coordinate Impact Assessment work groups with your agency BSTs and SMEs

- Communicate BEACON HR/Payroll Project information to agencies

- Review the BST Scorecards to verify your agency is participating with various BEACON HR/Payroll Project activities

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Upcoming Project Activities (Cont'd)

What can you expect from us?

- Weekly BEACON HR/Payroll Project website updates

- BST Training Agent Meeting

- BST Change Agent Impact Assessment workshop

- Finalization of training sites

- Next Month's Topics include **Payroll** and **Training** Updates

Questions?

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Upcoming BST Sponsor Meetings

Date	Time
Tuesday, April 17, 2007	10 am – 11 am
Tuesday, May 22, 2007	10 am – 11 am
Tuesday, June 19, 2007	10 am – 11 am
Tuesday, July 24, 2007	10 am – 11 am

Check out the BEACON HR/Payroll Project website at:

www.beacon.nc.gov

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BEACON HR/Payroll Project Resources

If you have any questions pertaining to the BSTs, communications, or change activities please contact:

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  Training Lead
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  Communications Lead
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  Phone: 919-431-6523

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  Change/Workforce Transition Lead
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  Phone: 919-431-6623

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